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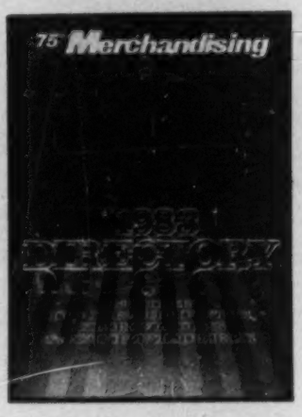

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EIGHTH ANNUAL MAJOR APPLIANCE STATISTICAL & MARKETING REPORT

Consumers are being drawn to high-quality, efficient appliances, but overall shipments are expected to plummet this year

The change is coming. Slowly but surely, consumers are becoming more aware that, in the long run, it's to their advantage to buy better-quality, more-efficient appliances.

More units shipped this year in the dishwasher market, for example, will have energy-saving cycles—93 percent of them, compared with 90 percent in 1981.

More air conditioners will sport high E.E.R. ratings in 1982—47.3 percent, a percentage point gain of 3.0 over the previous year.

Of the washers shipped this year, greater numbers will feature electronic controls—9.7 percent, up from 5.0 percent in 1981. Dryers, too, are moving in this direction. Electronic controls will be evident on 9.3 percent of the units received by retailers this year, a gain of 4.3 percentage points.

As for refrigerators, 86.8 percent of those shipped this year will sport energy-saving devices, a jump of 1.8 percentage points.

Shipments are down

Nevertheless, gains in this direction have not been strong enough to overcome the generally weak retail demand for appliances and the resultant decline in manufacturers' shipments in all areas.

Not one category in major appliances is expected to show a gain in shipments this year—not even microwave ovens (expected to decline by 6.1 percent).

Certainly the slump in the builder's market has taken its toll, hurting especially the production of refrigerators, ranges, central air treatment systems and dishwashers, all of which depend on new home starts for a significant percentage of sales.

The remodeling market has picked up some of the slack, but this year, said suppliers, even this "just hasn't been what we thought it would be."

Consumers simply have fewer dollars at their disposal, and kitchen remodeling is not an inexpensive proposition. Just the replacement of a large refrigerator, for example, can strap a consumer for $1,000 or more. Remodeling an entire kitchen can *easily* run over $10,000.

Certainly, there's little doubt that when an appliance breaks consumers can't manage for long without, say, a refrigerator or a washing machine. But manufacturers have long lamented the fact that if just one burner is working on a range, some consumers will postpone a purchase. Today, for many buyers, a room air conditioner or microwave oven is simply an unnecessary luxury as long as dollars remain tight.

And there are no major styling changes to make old appliances at least appear obsolete.

Suppliers have done a great job building better-quality, energy-efficient products. But they don't look very, if any, different from the refrigerators, dishwashers and ranges on the market 15 years ago. Changing aesthetics are certainly not generating many sales.

And if an appliance should malfunction, the going prices of today's appliances can still deter purchases in many instances.

Granted, service costs have risen too. But even a $100 repair bill may appear more palatable to a budget-conscious consumer than a $400 bill for a new washer, even though it makes less sense in the long run.

Furthermore, several manufacturers are now making an effort to encourage consumers to handle their own repairs, providing literature that instructs the buying public about the warning signals of a potential malfunction and about how to fix it on their own.

Programs like General Electric's Quick Fix System are geared to the estimated 40 percent of the market that now repairs its own appliances. While this is probably quite commendable from a consumer point of view, and it might increase the market share of the firms offering the programs, it will also, inevitably, keep more appliances operating longer, decreasing replacement sales.

In addition, some retailers and suppliers are pushing more service contracts. Again, while there are benefits to be realized from such programs, these too will serve to give appliances a longer life expectancy.

Hits rock bottom?

But all is not gloom and doom. There are indications this fall that the skid in appliance shipments may, at last, have hit rock bottom.

Interest rates have started to drop and a stronger rate of housing starts is anticipated for 1983. A moderate growth rate is being predicted by some economists for the coming year, spurred by what they hope will be a stronger economy. Once that activity begins, there will be more shipments of appliances to supply that market segment.

But what about the replacement market? Will that segment also rebound? Probably not to previous levels, at least not if the domestic industry continues to offer only the same types of appliances it has for the past several years.

No doubt, some product features will continue to be improved. But at the same time, electronic controls, for example, do not make the product's performance so drastically better that a consumer would be spurred to purchase a new unit. The same holds true for better insulation, pilotless ignition and most of the other advanced features which many of today's appliances sport.

What manufacturers should be concerned about are those market segments which are not being addressed by today's offerings.

There are customers in urban areas who genuinely need to replace 11- and 12-cu.-ft. refrigerators with similarly sized models. But while the buyer may want a fully featured unit, none are available from domestic suppliers in this size range.

Instead, it's the foreign suppliers and/or importers who are taking the initiative here. As a result, they may ultimately control this part of the market.

The Japanese have already captured a large share of the automobile, consumer electronics and microwave oven markets in this country. In white goods, however, their share is estimated at around one percent.

But drawn by a lack of response from domestic suppliers, they may step in to fill the gap in full-featured, space-saving appliances. If U.S. suppliers don't respond, they may find it hard to regain a market once it has been lost to the competition.

After all, in Japan, smaller living spaces, hence smaller appliances, are already the rule. Indications are, the U.S. is not far behind.

Challenges abound

What we're trying to say is that the major appliance industry is ripe for a rebound. But it's never going to return to the world it knew prior to the Eighties. That world, if not already gone, is fading fast.

There's a new order out there, one that calls for a new way of thinking. Innovative products that fit today's styles of living, today's needs, must be developed. Imagination is called for, both on the part of the manufacturers that make the products and the retailers that sell them.

—Nancy Markov
managing editor/major appliances

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STATISTICAL MATTER for this survey was collected and compiled by **Selma Book**, *market research manager, and* **Roberta Janasz**, *research associate.*

EIGHTH ANNUAL MAJOR APPLIANCE STATISTICAL & MARKETING REPORT

Cooking

Microwave oven shipments should register a 6.1% decline; consumer cutbacks in spending contribute to slowdown

Microwave ovens, the star of the appliance industry and the only category to show significant gains annually for the past few years, are not expected to even maintain 1981 shipment levels this year. Instead, the industry is expected to see a decline of 6.1 percent, to 4,138,000 units.

A year ago, suppliers were projecting that 1981 shipments would surpass 4.5 million units. However, the slowing sales rate, which became evident around the fourth quarter of last year (1981 shipments were 4,407,000 units), has continued throughout most of 1982. Even so, this year's fourth quarter gift-giving activity may add some bonus volume to this category.

Certainly, consumer cutbacks in spending have contributed to the slowdown. They "need" a range to cook with, but a microwave oven is still a luxury for many.

Cooking appliances, total factory shipments

	1982	1981	% of Change
Ranges, electric, total	2,028,000	2,413,000	−16.0%
Free-standing	1,536,000	1,852,000	−17.1%
All others, total	492,000	561,000	−12.3%
Slide-in	109,000	126,000	−13.5%
Drop-in	93,000	109,000	−14.7%
Cooktop	148,000	166,000	−10.9%
Built-in wall oven	142,000	160,000	−11.3%
Ranges, gas, total	1,422,000	1,501,000	−5.3%
Free-standing	1,242,000	1,306,000	−4.9%
All others, total	180,000	195,000	−7.7%
Smoothtop ranges	102,000	134,000	−23.9%
Microwave ovens, total	4,138,000	4,407,000	−6.1%
Countertop	3,891,000	4,104,000	−5.2%
Combination	247,000	303,000	−18.5%

Percent of countertop microwave oven shipments by retail price range

	1982	1981	% Pt. Change
Under $250	6.6%	5.4%	+1.2
$250 - $299	14.2%	13.0%	+1.2
$300 - $399	30.5%	28.5%	+2.0
$400 - $499	28.5%	29.7%	−1.2
$500 - $600	15.4%	18.5%	−3.1
Over $600	4.8%	4.9%	−0.1

Percent of microwave oven combinations shipped by type

	1982	1981	% Pt. Change
Single cavity	16.1%	17.3%	−1.2
Electric double-oven	70.1%	70.1%	0.0
Gas double-oven	13.8%	12.6%	+1.2

Percent of range shipments by size

	Electric			Gas		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
24 in. & under	8.3%	8.4%	−0.1	11.3%	8.8%	+2.5
30 in.	86.5%	84.7%	+1.8	78.5%	79.4%	−0.9
36 in.	3.0%	3.6%	−0.6	9.4%	10.5%	−1.1
40 in.	2.2%	3.3%	−1.1	0.8%	1.3%	−0.5

Percent of ranges shipped with cleaning systems

	Electric ranges			Gas ranges		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Self-cleaning	42.6%	42.3%	+0.3	14.7%	14.4%	+0.3
Continuous-clean	17.5%	19.1%	−1.9	29.5%	31.0%	−1.5

Percent of range sales by type of outlet

	Electric			Gas			Smoothtop		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Appliance/ TV store	40.3%	41.1%	−0.8	41.6%	41.6%	0.0	42.2%	40.6%	+1.6
Builder/contractor	10.2%	10.7%	−0.5	7.0%	7.6%	−0.6	5.4%	6.5%	−1.1
Catalog showroom	1.0%	1.4%	−0.4	0.9%	1.0%	−0.1	0.8%	0.5%	+0.3
Catalog store (Sears, Penneys, etc.)	22.1%	21.2%	+0.9	30.8%	29.8%	+1.0	23.4%	24.7%	−1.3
Department store	5.1%	5.4%	−0.3	2.9%	3.6%	−0.7	8.2%	9.5%	−1.3
Discount store	3.3%	2.8%	+0.5	4.6%	4.2%	+0.4	2.0%	2.0%	0.0
Furniture store	4.1%	4.3%	−0.2	5.9%	5.8%	+0.1	3.0%	3.0%	0.0
Home improvement center	3.3%	3.1%	+0.2	1.3%	1.2%	+0.1	2.0%	1.5%	+0.5
Kitchen remodeler	9.4%	9.9%	−0.5	4.9%	5.0%	−0.1	13.0%	11.7%	+1.3
Other	1.2%	0.1%	+1.1	0.1%	0.2%	−0.1	0.0%	0.0%	0.0

Percent of microwave oven combinations shipped by retail price range

	1982	1981	% Pt. Change
Under $650	7.0%	7.7%	−0.7
$650 -$749	14.3%	13.8%	+0.5
$750 - $849	24.6%	22.8%	+1.8
$850 - $1,000	29.3%	29.5%	−0.2
Over $1,000	24.8%	26.2%	−1.4

Percent of microwave oven sales by type of outlet

	1982	1981	% Pt. Change
Appliance/TV store	36.2%	37.3%	−1.1
Builder/contractor	2.1%	2.9%	−0.8
Catalog showroom	4.3%	4.4%	−0.1
Catalog store (Sears, Penneys, etc.)	26.5%	24.0%	+2.5
Department store	8.2%	9.6%	−1.4
Discount store	11.4%	11.4%	0.0
Furniture store	3.6%	4.3%	−0.7
Home improvement center	1.4%	1.1%	+0.3
Kitchen remodeler	3.5%	3.6%	−0.1
Other	2.8%	1.4%	+1.4

Percent of gas ranges shipped with pilotless ignition

	1982	1981	% Pt. Change
Pilotless ignition	78.3%	75.0%	+3.3

Percent of ranges shipped which accept options (i.e. grills, griddles, deep fat fryers, rotisseries)

	1982	1981	% Pt. Change
Electric ranges	9.9%	10.3%	−0.4
Gas ranges	4.1%	3.7%	+0.4

Percent of range shipments by color

	1982	1981	% Pt. Change
Almond	44.5%	42.4%	+2.1
Avocado	1.9%	3.1%	−1.2
Coffee	2.0%	3.1%	−1.1
Coppertone	0.4%	0.0%	+0.4
Harvest gold	5.1%	6.4%	−1.3
Wheat	9.5%	9.4%	+0.1
White	35.0%	32.9%	+2.1
Black glass and other	1.6%	2.7%	−1.1

Percent of range shipments with double-oven

	1982	1981	% Pt. Change
Electric	21.1%	20.8%	+0.3
Gas	18.2%	19.2%	−1.0

EIGHTH ANNUAL MAJOR APPLIANCE STATISTICAL & MARKETING REPORT

Cleanup

Consumers concentrate on energy-saving dishwashers, although total shipments are expected to decline 19.6%

More of the dishwashers that manufacturers are shipping in 1982 have energy-saving cycles—93 percent of them, compared with 90 percent in 1981.

Evidently, consumers in the dishwasher market are growing more concerned with features like hot water boosters (which heat the dishwasher's water even though the home heating system may be at a lower setting), air instead of heat drying and programmable cycles for delayed start and reduced water usage.

Consequently, many of the units shipped are sporting higher price tags.

Only 54 percent of the built-in dishwashers shipped this year will have retails of $349 or less. In 1981, this part of the market registered 61 percent.

Meanwhile, dishwashers priced from $350 to $399 will capture 17.3 percent of the market, up 0.6 percentage points. In the $400 to $450 price spread there should be a 0.7 percentage point gain to 14.2 percent. But the largest jump comes in units priced over $450—these models will account for 15 percent of the shipments in 1982 compared with just 8.8 percent in 1981.

Portable models, too, should reflect higher retails.

In 1981, 62 percent of the portable units were shipped with retail tags of under $349. In 1982, this category should register 53.4 percent of expected shipments.

Units priced from $350 to $400 accounted for 14.5 percent of shipments in 1981; this year the number should rise to 18.3 percent.

Similarly, models that will retail for over $400 are expected to show a percentage point gain of 4.8 this year to 28.3 percent of the units shipped.

Unfortunately, while some consumers are trading up, there are fewer of them making purchases. The total number of dishwashers expected to be shipped this year numbers 2,068,000 units, a 19.6 percent decline from 1981's total of 2,573,000.

Built-in models will register a drop of 18.3 percent, to 1,846,000, down from 2,260,000 units in 1981.

Portable units will show an even larger decrease—29.1 percent. In 1981, the units shipped numbered 313,000. In 1982, this number will be around 222,000.

Builders lose ground

Fewer units will be shipped to the builder/contractor market in 1982. This segment will decline in share by 2.8 percentage points, to 28.2 percent, reflecting the continued malaise of the housing market.

Shipments to kitchen remodelers have also faltered, indicating that this market may not have been as strong this year as was anticipated earlier. Traditionally, when housing starts are down, many consumers, unable to move, put more dollars into refurbishing their existing homes. Yet remodeling outlets are expected to lose ground—1.4 percentage points—and will account for 6.2 percent of the units shipped.

Picking up the slack are appliance/TV outlets, at 26.3 percent, up from 24.8 percent last year. Also gaining will be catalog stores, at 24.8 percent, up from 22 percent in 1981.

The consumer buying a dishwasher today apparently wants to be sure it will not need to be replaced too quickly if, for example, he decides to switch color schemes. He wants flexibility, so 58.4 percent of the units being shipped will offer interchangeable multi-panel packages so that a color can be switched at whim. This is up from 44 percent in 1981.

After that, the second color preference in dishwashers is again almond, at 20 percent of the units shipped. This year, however, it will show a 1.4 percentage point slip from 1981's numbers.

Disposers drop 17.3%

Last year, food waste disposers showed some strength in the marketplace, resulting from replacement purchases by consumers who now consider this product to be more of a convenience than a luxury.

This year, however, many consumers are making do with existing units—or doing without. Manufacturers have projected a drop in disposer shipments of 17.3 percent, to 2,536,000 units, down from 3,067,000 units in 1981.

Following last year's downward cycle, builder/contractors have lost share in this category, down 3.1 percentage points to 28.2 percent of the units being shipped. And kitchen remodelers are also expected to lose ground, coming in at 11.2 percent, down from 12.2 percent in 1981.

Perhaps because they are often the outlets that handle disposer repairs, making replacement purchases easiest for the consumer, plumbing contractors should again improve their share of this market, up from 19 percent in 1981 to 22.8 percent of the units shipped this year.

Catalog stores should boost their share of shipments from 15.3 percent in 1981 to 17 percent in 1982.

Appliance/TV outlets, however, will lose out, with a 1.5 percentage point decline to 8.8 percent.

Cleanup appliances, total factory shipments

	1982	1981	% of Change
Cleanup appliances, total	4,762,000	5,849,000	−18.6%
Dishwashers, total	2,068,000	2,573,000	−19.6%
Portable	222,000	313,000	−29.1%
Built-in	1,846,000	2,260,000	−18.3%
Food waste disposers	2,536,000	3,067,000	−17.3%
Trash compactors	158,000	209,000	−24.4%

Percent of portable dishwasher shipments by retail price range

	1982	1981	% Pt. Change
Under $250	13.0%	15.0%	−2.0
$250 - $299	17.7%	21.0%	−3.3
$300 - $349	22.7%	26.0%	−3.3
$350 - $400	18.3%	14.5%	+3.8
Over $400	28.3%	23.5%	+4.8

Percent of dishwasher shipments by color

	1982	1981	% Pt. Change
Almond	20.0%	21.4%	−1.4
Avocado	1.0%	1.5%	−0.5
Coffee	1.0%	2.0%	−1.0
Coppertone	0.8%	1.0%	−0.2
Harvest gold	1.6%	2.3%	−0.7
Wheat	3.0%	4.3%	−1.3
White	9.0%	10.8%	−1.8
Wood grain	1.4%	4.0%	−2.6
Multicolor panel packages	58.4%	44.0%	+14.4
Other	3.8%	8.7%	−4.9

Percent of trash compactor shipments by color

	1982	1981	% Pt. Change
Almond	41.5%	39.0%	+2.5
Avocado	2.5%	4.7%	−2.2
Coffee	3.7%	5.4%	−1.7
Coppertone	1.8%	1.3%	+0.5
Harvest gold	5.2%	7.0%	−1.8
Wheat	10.0%	11.0%	−1.0
White	31.7%	30.3%	+1.4
Wood grain	1.3%	1.3%	0.0
Other	2.3%	0.0%	+2.3

Percent of built-in dishwasher shipments by retail price range

	1982	1981	% Pt. Change
Under $250	10.8%	12.0%	−1.2
$250 - $299	18.5%	21.5%	−3.0
$300 - $349	24.2%	27.5%	−3.3
$350 - $399	17.3%	16.7%	+0.6
$400 - $450	14.2%	13.5%	+0.7
Over $450	15.0%	8.8%	+6.2

Percent of dishwashers shipped with energy-saving cycles

	1982	1981	% Pt. Change
Energy-saving cycles	93.0%	90.0%	+3.0

Percent of dishwasher sales by type of outlet

	1982	1981	% Pt. Change
Appliance/TV store	26.3%	24.8%	+1.5
Builder/contractor	28.2%	31.0%	−2.8
Catalog showroom	0.4%	0.2%	+0.2
Catalog store (Sears, Penneys, etc.)	24.8%	22.0%	+2.8
Department store	2.7%	3.6%	−0.9
Discount store	6.9%	7.8%	−0.9
Furniture store	1.7%	1.2%	+0.5
Home improvement center	1.8%	1.4%	+0.4
Kitchen remodeler	6.2%	7.6%	−1.4
Plumbing contractor	1.0%	0.4%	+0.6

Percent of trash compactor sales by type of outlet

	1982	1981	% Pt. Change
Appliance/TV store	25.7%	24.6%	+1.1
Builder/contractor	20.5%	21.6%	−1.1
Catalog showroom	1.3%	1.6%	−0.3
Catalog store (Sears, Penneys, etc.)	28.2%	26.8%	+1.4
Department store	11.0%	12.6%	−1.6
Discount store	2.0%	3.2%	−1.2
Home improvement center	2.8%	2.2%	+0.6
Kitchen remodeler	8.5%	7.4%	+1.1

Percent of food waste disposer sales by type of outlet

	1982	1981	% Pt. Change
Appliance/TV store	8.8%	10.3%	−1.5
Builder/contractor	28.2%	31.3%	−3.1
Catalog showroom	0.2%	0.1%	+0.1
Catalog store (Sears, Penneys, etc.)	17.0%	15.3%	+1.7
Department store	2.0%	2.5%	−0.5
Home improvement center	9.8%	9.3%	+0.5
Kitchen remodeler	11.2%	12.2%	−1.0
Plumbing contractor	22.8%	19.0%	+3.8

EIGHTH ANNUAL MAJOR APPLIANCE STATISTICAL & MARKETING REPORT

Air Treatment

Air conditioner shipments are expected to drop 19.6% as manufacturers battle the economy and the weather

"Disastrous" could be an apt description of the air conditioner business for 1982, almost a complete reversal of the situation in 1981.

Instead of oppressive temperatures in many parts of the country, retailers across the nation found weather conditions for the most part to be cool this past summer.

Instead of not being able to get enough goods on their shelves to meet heavy consumer demand, many couldn't move the air conditioners they did have. Consequently, manufacturers were caught with inventories which few dealers wanted.

But this should come as no surprise. The room air conditioner business has consistently operated this way. Retailers bullishly buy units after a good season, only to be stuck with goods the next if weather conditions don't measure up. The following year, then, as will probably be the case in 1983, retailers and manufacturers both will exercise even greater amounts of caution than a weak economy would dictate, so as not to get burned again.

Retailers, however, are in the best position. Many have been able to return or refinance most of the carryover they were left with, at the expense of the suppliers. But the loss of volume a poor air conditioner season creates can seriously hurt a dealer's annual profit.

Room air shipments plummet

Shipments of room air conditioners are expected to decline 19.6 percent for 1982, to 2,851,000 units, down from 3,547,000 in 1981. But this is shipments. As mentioned earlier, since a lot of those units shipped did not sell to consumers, a significant portion are still in the pipeline.

The air conditioners retailers did order in 1982 varied little from those they had sold the previous year in size and features.

Units under 7,000 Btu's, often used to spot-cool bedrooms, are expected to gain only 0.6 percentage points, to capture 31.5 percent of the units shipped. Also gaining will be the 11,000- to 19,000-Btu category, up 1.4 percentage points, to 32.2 percent.

Air treatment, total factory shipments

	1982	1981	% of Change
Air Treatmcnt, total	3,533,000	4,378,000	−19.3%
Air Conditioners, room	2,851,000	3,547,000	−19.6%
Air Cleaners, total	192,000	230,000	−16.5%
Portable (room type)	53,000	65,000	−18.5%
Central & duct mount	139,000	165,000	−15.8%
Dehumidifiers	490,000	601,000	−18.5%

Percent of dehumidifier sales by type of outlet

	1982	1981	% Pt. Change
Appliance/TV store	27.7%	28.0%	−0.3
Catalog showroom	1.3%	1.0%	+0.3
Catalog store (Sears, Penneys, etc.)	27.3%	25.0%	+2.3
Department store	17.0%	19.0%	−2.0
Discount store	21.0%	20.5%	+0.5
Furniture store	5.0%	5.5%	−0.5
Home improvement center	0.7%	1.0%	−0.3

Percent of dehumidifier shipments by capacity

	1982	1981	% Pt. Change
15 pts. & under	9.0%	9.5%	−0.5
16 - 29 pts.	51.3%	59.5%	−8.2
30 pts. & over	39.7%	31.0%	+8.7

Percent of room air conditioner shipments by size

	1982	1981	% Pt. Change
Under 7,000 Btu's	31.5%	30.9%	+0.6
7,000 - 10,000 Btu's	26.6%	28.4%	−1.8
11,000 - 19,000 Btu's	32.2%	30.8%	+1.4
20,000 Btu's and over	9.7%	9.9%	−0.2

Percent of room air conditioner shipments by retail price range

	1982	1981	% Pt. Change
Under $150	2.2%	2.0%	+0.2
$150 - $250	25.8%	27.2%	−1.4
$251 - $350	28.4%	26.1%	+2.3
$351 - $450	24.2%	24.6%	−0.4
$451 - $550	11.0%	10.5%	+0.5
$551 - $650	5.0%	5.5%	−0.5
$651 - $750	1.8%	2.4%	−0.6
Over $750	1.6%	1.7%	−0.1

Percent of room air conditioner sales by type of outlet

	1982	1981	% Pt. Change
Appliance/TV store	28.4%	27.6%	+0.8
Builder/contractor	3.8%	3.6%	+0.2
Catalog showroom	2.6%	2.6%	0.0
Catalog store (Sears, Penneys, etc.)	21.6%	19.6%	+2.0
Department store	13.2%	15.6%	−2.4
Discount store	25.2%	27.3%	−2.1
Furniture store	2.4%	1.7%	+0.7
Home improvement center	1.8%	1.0%	+0.8
Kitchen remodeler	1.0%	1.0%	0.0

Percent of room air conditioner shipments by E.E.R.

	1982	1981	% Pt. Change
High (7.5 and over)	47.3%	44.3%	+3.0
Low (under 7.5)	52.7%	55.7%	−3.0

Refrigeration

Refrigerator shipments are predicted to fall 13.2%, and consumers tend to buy small, when they buy at all

A category largely dependent on the builder's market, refrigerators will register a drop in shipments of 13.2 percent this year, to 4,801,000 units, down from 5,531,000 in 1981.

Freezers will show a decline of 17.7 percent, to 1,548,000 units, down from 1981 levels of 1,880,000.

Of the units which will be shipped, however, more in both categories will be mid-size. This reflects an increase in urban living and a swing to smaller homes. In many cases, however, it is simply due to the more-affordable price points of these models for the penny-conscious consumer.

Slightly more than 50 percent of the refrigerators shipped this year will be in the 14- to 17-cu.-ft. size ranges, up from 48.7 percent in 1981.

Percent of refrigerator shipments by size

	1982	1981	% Pt. Change
6.5 to 11 cu. ft.	4.0%	3.7%	+0.3
12 - 13 cu. ft.	7.8%	7.8%	0.0
14 - 15 cu. ft.	25.7%	24.7%	+1.0
16 - 17 cu. ft.	24.7%	24.0%	+0.7
18 - 19 cu. ft.	18.8%	19.2%	−0.4
20 - 21 cu. ft.	10.8%	11.4%	−0.6
22 cu. ft. & over	8.2%	9.2%	−1.0

The 15- to 17-cu.-ft. size range will also show a gain in freezers, up to 42.8 percent this year, from 40.5 percent in 1981.

High-end features gain

Still, there are indications that at least some refrigerator consumers consider high-end features more important.

Energy-saving devices will be found on 86.8 percent of refrigerators this year, a gain of 1.8 percentage points.

Automatic ice makers will be shipped on 13.5 percent of refrigerators, a percentage point gain of 0.4.

More top-mount and side-by-side units will have through-the-door ice and/or water—2.3 percent and 25.9 percent, respectively.

The bulk of the refrigerator business will again fall in the $400 to $649 price range—53.2 percent, down slightly from 54 percent in 1981.

Refrigeration appliances, total factory shipments

	1982	1981	% of Change
Refrigerators/ freezers, total	6,349,000	7,411,000	−14.3%
Refrigerators, total	4,801,000	5,531,000	−13.2%
Top-mount (6.5 cu. ft. & over)	3,286,000	3,732,000	−12.0%
Side-by-side (6.5 cu. ft. & over)	617,000	789,000	−21.8%
Bottom-mount (6.5 cu. ft. & over)	79,000	105,000	−24.8%
Single-door (6.5 cu. ft. & over)	319,000	371,000	−14.0%
Compacts (under 6.5 cu. ft.)	500,000	534,000	−6.4%
Freezers, total	1,548,000	1,880,000	−17.7%
Chest (10 cu. ft. & over)	702,000	891,000	−21.2%
Upright (10 cu. ft. & over)	579,000	698,000	−17.1%
Compacts (under 10 cu. ft.)	267,000	291,000	−8.3%

In freezers, 66.2 percent of the units shipped are expected to retail for between $300 and $499.

Refrigeration

Percent of compact refrigerator shipments by size

	1982	1981	% Pt. Change
2 cu. ft.	30.5%	30.7%	−0.2
3 cu. ft.	6.0%	7.0%	−1.0
4.5 cu. ft.	35.5%	34.8%	+0.7
4.6 - 6.4 cu. ft.	28.0%	27.5%	+0.5

Percent of freezer shipments by size

	1982	1981	% Pt. Change
10 - 14 cu. ft.	27.3%	28.5%	−1.2
15 cu. ft.	20.2%	20.0%	+0.2
16 - 17 cu. ft.	22.6%	20.5%	+2.1
18 -19 cu. ft.	8.2%	8.0%	+0.2
20 cu. ft. & over	21.7%	23.0%	−1.3

Percent of compact freezer shipments by size

	1982	1981	% Pt. Change
4 cu. ft.	9.3%	14.0%	−4.7
5 - 6 cu. ft.	28.7%	27.3%	+1.4
7 - 8 cu. ft.	29.7%	26.7%	+3.0
9 - 9.9 cu. ft.	32.3%	32.0%	+0.3

Percent of refrigerators shipped with automatic ice makers

	1982	1981	% Pt. Change
Automatic ice makers	13.5%	13.1%	+0.4

Percent of refrigerators shipped with through-the-door ice and/or water

	1982	1981	% Pt. Change
Top-mount	2.3%	1.8%	+0.5
Side-by-side	25.9%	25.8%	+0.1

Percent of refrigerator shipments by retail price range

	1982	1981	% Pt. Change
Under $300	3.8%	5.2%	−1.4
$300 - $399	10.2%	9.7%	+0.5
$400 - $499	19.6%	22.0%	−2.4
$500 - $649	33.6%	32.0%	+1.6
$650 - $800	18.2%	17.1%	+1.1
Over $800	14.6%	14.0%	+0.6

Percent of freezer shipments by retail price range

	1982	1981	% Pt. Change
Under $300	23.0%	23.2%	−0.2
$300 - $399	39.0%	39.7%	−0.7
$400 - $499	27.2%	26.7%	+0.5
$500 - $600	6.4%	6.4%	0.0
Over $600	4.4%	4.0%	+0.4

Percent of refrigerator and freezer shipments by defrosting system

	Refrigerators			Freezers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
No-frost	82.5%	80.7%	+1.8	8.7%	9.2%	−0.5
All other	17.5%	19.3%	−1.8	91.3%	90.8%	+0.5

Percent of refrigerator and freezer shipments by color

	Refrigerators			Freezers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Almond	42.0%	38.0%	+4.0	10.5%	6.5%	+4.0
Avocado	2.8%	4.5%	−1.7	0.3%	0.5%	−0.2
Coffee	2.4%	3.0%	−0.6	0.5%	2.5%	−2.0
Coppertone	0.0%	0.0%	0.0	0.3%	0.5%	−0.2
Harvest gold	1.2%	2.5%	−1.3	0.5%	1.0%	−0.5
Wheat	14.8%	14.5%	+0.3	1.9%	3.0%	−1.1
White	36.2%	37.0%	−0.8	80.5%	80.0%	+0.5
Wood grain	0.6%	0.5%	+0.1	5.5%	6.0%	−0.5

Percent of refrigerator and freezer sales by type of outlet

	Refrigerators			Freezers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Appliance/TV store	32.8%	30.2%	+2.6	14.5%	11.2%	+3.3
Builder/contractor	12.3%	15.0%	−2.7	0.5%	1.0%	−0.5
Catalog store (Sears, Penneys, etc.)	28.6%	26.2%	+2.4	46.7%	44.8%	+1.9
Department store	8.0%	12.8%	−4.8	14.3%	17.5%	−3.2
Discount store	5.1%	4.1%	+1.0	13.1%	15.7%	−2.6
Furniture store	4.7%	3.9%	+0.8	4.1%	4.2%	−0.1
Home improvement center	2.2%	1.8%	+0.4	1.8%	1.1%	+0.7
Kitchen remodeler	1.5%	2.4%	−0.9	0.4%	0.1%	+0.3
Other	4.8%	3.6%	+1.2	4.6%	4.4%	+0.2

Percent of compact refrigerator and freezer sales by type of outlet

	Compact refrigerators			Compact freezers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Appliance/TV store	24.5%	23.5%	+1.0	17.9%	15.7%	+2.2
Builder/contractor	0.6%	1.1%	−0.5	0.5%	0.8%	−0.3
Catalog showroom	6.7%	6.5%	+0.2	4.0%	3.6%	+0.4
Catalog store (Sears, Penneys, etc.)	33.7%	31.3%	+2.4	41.0%	42.7%	−1.7
Department store	8.7%	11.0%	−2.3	11.6%	12.3%	−0.7
Discount store	18.1%	17.5%	+0.6	15.9%	14.3%	+1.6
Furniture store	1.5%	2.9%	−1.4	4.8%	5.0%	−0.2
Home improvement center	0.7%	0.7%	0.0	0.9%	0.9%	0.0
Kitchen remodeler	1.0%	0.3%	+0.7	0.0%	0.0%	0.0
Other	4.5%	5.2%	−0.7	3.4%	4.7%	−1.3

Percent of compact refrigerator shipments by retail price range

	1982	1981	% Pt. Change
Under $120	30.8%	33.3%	−2.5
$120 - $149	20.6%	15.5%	+5.1
$150 - $180	29.0%	26.4%	+2.6
Over $180	19.6%	24.8%	−5.2

Percent of compact freezer shipments by retail price range

	1982	1981	% Pt. Change
Under $190	8.4%	10.0%	−1.6
$190 - $210	22.2%	22.5%	−0.3
$211 - $240	33.8%	29.7%	+4.1
$241 - $280	22.2%	19.3%	+2.9
Over $280	13.4%	18.5%	−5.1

Percent of refrigerators shipped with energy-saving devices

	1982	1981	% Pt. Change
Energy-saving devices	86.8%	85.0%	+1.8

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Laundry

Laundry appliances expected to fare better than most; nevertheless, total shipments should decline 5.3%

Less dependent on the builder's market than other appliance categories, laundry products should fare somewhat better this year than other product areas, but shipments will still register a decline.

Total washer shipments are expected to drop 5.5 percent, to 4,235,000 units. Of these, 3,900,000 will be automatic and semi-automatic models measuring 25 in. or more in width, a 4.4 percent drop from 1981 numbers of 4,081,000.

The largest percent drop occurs in the wringer and spinner category, which should account for 83,000 units this year, a 27.2 percent decline from 114,000 units last year.

Typically, washers have been the strongest seller in the washer/dryer pair because they are considered to be a necessity by most homeowners. When a washer breaks, it has to be replaced. In contrast, a dryer purchase can often be postponed for a time.

But total dryer shipments will drop only about as much as washers, down five percent this year—to 2,943,000 units.

Importantly, of those washers shipped, more of them will feature electronic controls than last year—a projected 9.7 percent, up from 5.0 percent.

But essentially, it appears that most consumers simply want relatively basic models.

There is a slight leaning towards washers sporting fewer operating cycles. Those units offering only one or two cycles edged up 0.3 percentage points, to 29.3 percent; models with three to four cycles will rise 0.4 percentage points, to 69.4 percent, both at the expense of units featuring five or more cycles.

Large-size capacities of 16 and 18 lbs. still account for the balance of washers shipped. Units with 18-lb. capacity will gain 0.7 percentage points, to register 48.7 percent this year. However, 16-lb. capacity models will slip slightly, to 20.3 percent, a decline of 1.2 percentage points.

Electric dryers drop slightly

Shipments of electric dryers will almost hold their own in 1982. A minimal decline of 1.6 percent, to 2,186,000 units shipped, should be registered from 1981's total of 2,221,000.

Where increased promoting by gas utilities accounted for a boost in shipments of gas dryers last year, the category will be down 11.9 percent this year, to 591,000 units.

As in washers, many consumers want models which are easy to understand and do the job. Units with one to two cycles gained 1.3 percentage points this year and will represent 33.3 percent of the units shipped.

And where last year automatic fabric settings jumped two percentage points, to 69 percent, this year this feature seems to be attracting less interest from consumers. Auto-dry is expected to show a 4.0 percentage point drop, to 65 percent of the dryers shipped.

Still, there is a consumer segment out there which is upgrading to better features. Internal electronic controls will be evident on 9.3 percent of the dryers shipped this year, a gain of 4.3 percentage points.

Percent of washer shipments by capacity

	1982	1981	% Pt. Change
12 lbs. & under	17.3%	17.5%	−0.2
14 lbs.	13.7%	13.0%	+0.7
16 lbs.	20.3%	21.5%	−1.2
18 lbs. and over	48.7%	48.0%	+0.7

Percent of washer and dryer shipments by color

	Washers			Dryers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Almond	25.0%	26.0%	−1.0	26.7%	27.0%	−0.3
Avocado	0.7%	2.0%	−1.3	1.0%	2.0%	−1.0
Coffee	0.7%	1.0%	−0.3	0.7%	1.0%	−0.3
Harvest gold	3.3%	5.0%	−1.7	3.7%	5.5%	−1.8
Wheat	5.3%	4.0%	+1.3	5.3%	4.0%	+1.3
White	65.0%	62.0%	+3.0	62.6%	60.5%	+2.1

Percent of washer and dryer shipments by internal control type

	Washers			Dryers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Electronic controls	9.7%	5.0%	+4.7	9.3%	5.0%	+4.3
Mechanical controls	90.3%	95.0%	−4.7	90.7%	95.0%	−4.3

Percent of washer and dryer shipments by number of cycles

	Washers			Dryers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
1 - 2	29.3%	29.0%	+0.3	33.3%	32.0%	+1.3
3 - 4	69.4%	69.0%	+0.4	65.4%	66.0%	−0.6
5 or more	1.3%	2.0%	−0.7	1.3%	2.0%	−0.7

Percent of washer and dryer sales by type of outlet

	Washers			Dryers		
	1982	1981	% Pt. Change	1982	1981	% Pt. Change
Appliance/TV store	34.0%	33.9%	+0.1	34.0%	32.9%	+1.1
Builder/contractor	4.0%	2.8%	+1.2	5.0%	3.2%	+1.8
Catalog showroom	2.5%	3.8%	−1.3	2.5%	3.7%	−1.2
Catalog store (Sears, Penneys, etc.)	39.0%	30.4%	+8.6	38.5%	30.0%	+8.5
Department store	8.0%	11.8%	−3.8	7.5%	11.8%	−4.3
Discount store	8.0%	10.4%	−2.4	8.5%	11.2%	−2.7
Furniture store	4.5%	6.9%	−2.4	4.0%	7.2%	−3.2

Home laundry appliances, total factory shipments

	1982	1981	% of Change
Laundry, total	7,178,000	7,577,000	−5.3%
Washers, total	4,235,000	4,479,000	−5.5%
Auto. & semi-auto (25 in. or more in width)	3,900,000	4,081,000	−4.4%
Wringer & spinner	83,000	114,000	−27.2%
Compact washers (24 in. or less in width)	252,000	284,000	−11.3%
Dryers, total	2,943,000	3,098,000	−5.0%
Electric (25 in. or more in width)	2,186,000	2,221,000	−1.6%
Gas	591,000	671,000	−11.9%
Compact dryers (24 in. or less in width)	166,000	206,000	−19.4%

Percent of washers shipped that are portable

	1982	1981	% Pt. Change
Portable	6.0%	5.5%	+0.5

Percent of dryer shipments by type

	1982	1981	% Pt. Change
Automatic fabric settings	65.0%	69.0%	−4.0
Time-dry	35.0%	31.0%	+4.0

Percent of compact washer and dryer sales by type of outlet

	1982	1981	% Pt. Change
Appliance/TV store	48.5%	49.0%	−0.5
Builder/contractor	0.5%	1.0%	−0.5
Catalog showroom	5.0%	5.0%	0.0
Catalog store (Sears, Penneys, etc.)	14.0%	13.0%	+1.0
Department store	10.5%	10.0%	+0.5
Discount store	11.5%	12.0%	−0.5
Furniture store	10.0%	10.0%	0.0

Merchandising's TOP FIFTY

Top 30 in videocassette rentals

		Last month's position	Months on chart
1.	Conan the Barbarian *(MCA)*	19	2
2.	Chariots of Fire *(Warner)*	1	3
3.	Star Wars *(CBS/Fox)* P	2	3
4.	Arthur *(Warner)*	3	3
5.	On Golden Pond *(CBS/Fox)* GI	6	3
6.	Death Wish II *(Warner)*	—	1
7.	Deathtrap *(Warner)*	—	1
8.	Quest for Fire *(CBS/Fox)*	—	1
9.	Cat People *(MCA)*	4	3
10.	Body Heat *(Warner)*	15	2
11.	Absence of Malice *(Columbia)*	11	3
12.	Superman II *(Warner)*	—	2
13.	Dead Men Don't Wear Plaid *(MCA)*	—	1
14.	Jane Fonda's Workout *(Karl Video)*	5	3
15.	Nice Dreams *(Columbia)*	—	1
16.	Sharky's Machine *(Warner)*	12	3
17.	The Sword and the Sorcerer *(MCA)*	—	1
18.	The Seduction *(Media)*	25	2
19.	Butterfly *(Vestron)*	17	2
20.	Prince of the City *(Warner)*	28	2
21.	Diamonds are Forever *(CBS/Fox)*	—	1
22.	Outland *(Warner)*	—	1
23.	Partners *(Paramount)*	29	2
24.	Only When I Laugh *(Columbia)*	—	1
25.	Ragtime *(Paramount)*	10	3
26.	Wrong Is Right *(Columbia)*	—	1
27.	Goldfinger *(CBS/Fox)*	—	2
28.	Dragonslayer *(Paramount)*	23	2
29.	Caddyshack *(Warner)* G	30	2
30.	Time Bandits *(Paramount)*	—	1

Top 10 in videocassette sales

1.	Jane Fonda's Workout *(Karl Video)*	1	4
2.	Star Wars *(CBS/Fox)* P	3	4
3.	On Golden Pond *(CBS/Fox)* GI	4	5
4.	Conan the Barbarian *(MCA)*	—	1
5.	Arthur *(Warner)*	2	2
6.	Star Trek II: The Wrath of Khan *(Paramount)*	8	2
7.	Death Wish II *(Warner)*	—	1
8.	Goldfinger *(CBS/Fox)*	—	2
9.	Rocky II *(CBS/Fox)*	6	3
10.	Body Heat *(Warner)*	—	1

Top 5 in CED videodisc sales

1.	Star Wars *(CBS/Fox)* P	5	2
2.	On Golden Pond *(RCA)* G	1	3
3.	Superman *(RCA)*	—	2
4.	Jane Fonda's Workout *(RCA)*	3	2
5.	The Howling *(RCA)*	—	1

Top 5 in laserdisc sales

1.	Star Wars *(CBS/Fox)*	1	2
2.	Olivia—Physical *(MCA)*	2	3
3.	Dumbo *(Disney)*	—	1
4.	Apocalypse Now *(Paramount)*	—	1
5.	Elephant Parts *(Pacific Arts)*	—	2

G—Title has gone gold—has sold 25,000 on disc and/or cassette and has sales of at least $1 million. (RIAA/Video)
P—Title has gone platinum—has sold 50,000 on disc and/or cassette and has sales of at least $2 million. (RIAA/Video)
I—Golden Videocassette award—has audited return of sales or rentals of $1 million unless company has a return policy. Then, the allowance must be deducted from the gross revenue. (ITA)

VIDEO/NEW RELEASES

COLUMBIA

CASEY'S SHADOW (1978) A young boy raises and races a horse whose mother died during its birth. Stars Walter Matthau and Alexis Smith. *Color PG.*

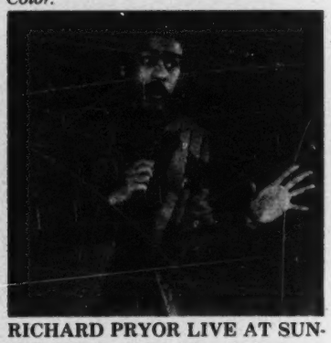
HANOVER STREET (1978) A love story set in war-torn London at the close of World War II. Stars Harrison Ford and Leslie Anne Downe. *Color PG.*

HBO PRESENTS DIANA ROSS IN CONCERT (1980) Live performance taped by Home Box Office. *Color.*

LOVE AND ANARCHY A Venetian peasant tries to assassinate Mussolini in retaliation for a friend's death. *Color NR.*

MONTY PYTHON AND THE HOLY GRAIL (1979) First feature movie starring this British comedy team. *Color R.*

MR. MAGOO VOL. 3 This collection of cartoons is narrated by Jim Backus. *Color.*



RICHARD PRYOR LIVE AT SUNSET STRIP (1981) Filmed during a performance. *Color R.*

SALES SPACE (1964) Drama about a computer malfunction that triggers a bomb attack on Moscow. *Color.*

TO FORGET VENICE (1979) Reunion amongst friends and family is upset when one of the relatives suddenly dies. *Color NR.*

DISNEY

ALICE IN WONDERLAND (1951) Animated adaptation of Lewis Carroll's magnificent story in which Alice falls down a rabbit hole and encounters crazy creatures. *Color 75 minutes C: $84.95.*

BABES IN TOYLAND (1961) The make-believe world of Mother Goose is brought to life in Disney's first live-action musical. *Color 119 minutes C: $69.95.*

DISNEY'S STORYBOOK CLASSICS Animated collection of children's fables including Little Toot (1948); Chicken Little (1943); The Grasshopper and the Ants (1934), and Peter and the Wolf (1946). *Color 121 minutes C: $49.95.*

FUN AND FANCY FREE (1947) In this animated presentation, Edgar Bergen relates the story of Mickey and the Beanstalk to Charlie McCarthy and Mortimer Snerd. Dinah Shore sings and narrates the story of Bongo, the runaway circus bear. *Color 96 minutes C: $49.95.*

MARY POPPINS (1964) Winner of five Oscars, this film combines live action with animation to relate the adventures of a magical nanny (Julie Andrews), her charges and a chimney sweep (Dick Van Dyke). *Color 139 minutes Stereo in VHS C:* $84.95.

SNOWBALL EXPRESS (1972) Comedy in which a New York accountant abandons life in the big city to run a hotel he inherits in the Rocky Mountains. *Color 120 minutes C: $69.95.*

MCA VIDEO

THE BEST OF MARVEL COMICS Contains five episodes of cartoons featuring Spiderman, Spiderwoman, Mister Fantastic, Invisible Girl and The Thing. *Color 112 minutes C: $60.95.*

THE GREEK TYCOON (1978) The world's richest shipping magnate marries the widow of a U.S. president. *Color 106 minutes R C: $60.95.*

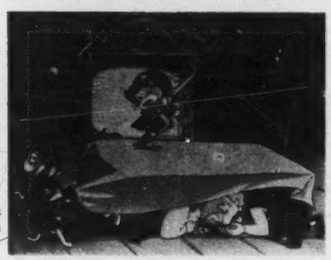
SOMETIMES A GREAT NOTION (1971) Drama tells the story of one timber family's fight against striking timber workers. Stars Henry Fonda. *Color 115 minutes PG C: $60.95.*

THE THING (1982) Scientists in the Antarctic find a survivor of an ancient spaceship, who has been entombed in ice since it crashed 100,000 years ago. *Color 127 minutes R Stereo in VHS C: $79.95.*

MEDIA

CHALLENGE TO BE FREE (1974) The struggle of a man trying to outwit 100 dogs and 12 men who are pursuing him across 1,000 miles of frozen wilderness. *Color 90 minutes G C: $49.95.*

THE NIGHT BEFORE CHRISTMAS (1980) Animated version of this Christmas poem is packaged with coloring book and flex-playing record. *Color 30 minutes G C: $39.95.*



PUSS 'N BOOTS (1980) Animated adventure story of a brave cat. *Color 80 minutes G C: $49.95.*

SILENT NIGHT (1980) A true story describes how this Christmas song was written. Features the Oberndorf Boys' Choir. *Color 27 minutes G C: $39.95.*

MGM/UA

DANGUARD ACE (1982) Animated feature in which a fighter robot helps a pilot combat the evil forces. *Color 100 minutes C: $59.95.*

DINER (1982) Camaraderie among five young men helps them deal with growing pains. *Color 110 minutes R C: $79.95. CED: $24.95.*

DR. SEUSS VIDEO FESTIVAL Includes two favorites: Horton Hears A Who (1970) and How The Grinch